

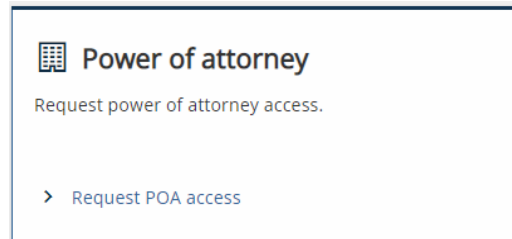


# INTIME ePOA Process

## Instructions for Tax Practitioners

A client (Business tax or Individual income tax customer) can grant a tax practitioner access to their INTIME account with an electronic Power of Attorney (ePOA). Here is how a tax practitioner can initiate an ePOA access request in INTIME:

**Step 1:** The tax practitioner will log in to their own [INTIME](#) account, go to the "All Actions" or "Preparer Actions" (tab) page, locate the "Power of attorney" panel, then click on the "Request POA Access" hyperlink and follow the prompts.



**Step 2:** The first screen will provide some answers to frequently asked questions (FAQs) about the Power of Attorney (POA) process. (More information is also available on [DOR's POA website](#).) Select "Next" to continue to the next step.

Request power of attorney access  
SAMPLE PREPARER  
00-0000001

**Request**

POA Information   Client Information   Access Options   Approval Method   Summary

### Power of Attorney Process for Tax Practitioners

**Power of Attorney (POA)**

**Client**

**Request Access**

**Approved/Deny Access on INTIME or Letter**

**Notified When Access has been Granted**

Can I still use the paper POA-1 form?  
Yes, you can still use the POA-1 form however, a paper POA-1 will not result in gaining online access to client accounts in INTIME.

If my client approves the INTIME POA access request, do I still need a POA-1 form on file?  
DOR will consider an INTIME POA equivalent to the POA-1 form for the purpose of discussing tax matters. DOR reserves the right to request the POA-1 form in certain circumstances, but in general, we will not require a POA-1 form in addition to an approved INTIME POA access request. The INTIME POA will only allow clients to approve access to the accounts currently in INTIME. A POA-1 may be needed for other tax types.

Does my client need to access the internet/register for INTIME to approve my request?  
If your client does not have the ability to access INTIME to approve your request, an access request letter will be mailed to his or her legal address on file with DOR. The letter can be used to approve your access request.

How long does it take to process an INTIME POA access request?  
If your client is able to create a login and access INTIME, he or she can approve your request and provide immediate access. Mailed access approval forms may take several weeks to be received and processed. In either case, you will be notified by email when the access is granted.

Once clients have approved your POA access request, they will be added to your client list. When that process is complete, you may:

- View any outstanding actions for each client, these may include new letters or messages from DOR
- Search the client list
- Manage which customers are initially visible using the "Manage Favorites" button.

Cancel   Save Draft   < Previous   Next >

**Step 3:** Select the ID type and number, along with the name of the business or individual from whom you are requesting an ePOA.

Indiana Department of Revenue

INTIME Indiana Taxpayer Information Management Engine

< SAMPLE PREPARER

**Request power of attorney access**  
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**Request**

POA Information Client Information Access Options Approval Method Summary

Enter the name and ID of the business or individual for whom you are requesting power of attorney

ID Type  
FEIN

FEIN  
00-0000000

Name of Business  
SAMPLE COMPANY

Cancel Save Draft Previous Next

**Step 4:** Select the option to request an ePOA to all the client's tax accounts or only select tax accounts.

**Note:** If requesting access to only select accounts, the client will have the option to select which accounts to allow the tax practitioner to access. The tax practitioner will see these accounts only once the ePOA is approved.

Indiana Department of Revenue

INTIME Indiana Taxpayer Information Management Engine

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POA Information Client Information Access Options Approval Method Summary

Select access options

I would like to request power of attorney access to all of my client's accounts

I would like to request power of attorney access to some of my client's accounts

Cancel Save Draft Previous Next

**Step 5:** Select an approval method that best represents your client’s situation:

**a. If the client is registered for INTIME, select the option for online approval.**

The client will receive an email advising them to log in to their account to approve the ePOA and account access request from their tax practitioner. The approval process is quick and will provide immediate access to the tax practitioner.

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Request power of attorney access  
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Request

POA Information Client Information Access Options Approval Method Summary

Is your client registered for INTIME?

My client is already registered for INTIME

My client is not registered for INTIME or unsure if they are registered

**i** Your client will receive an email and web message advising them to log in to their existing account and approve this access request.

Choose this option if you know that your client has a web account with INTIME.

Cancel Save Draft < Previous Next >

**a. If the client is not yet registered or unsure if they are registered (or does not have online access), select that option.**

If registered, the client will receive an email about signing in to INTIME to approve the access.

If **not** registered, they will receive a letter by mail at the legal address on file with DOR that will include instructions on how to sign up and access their INTIME account to approve the ePOA request.

INTIME Indiana Taxpayer Information Management Engine Indiana Department of Revenue

< Return to client list

Request power of attorney access  
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Request

POA Information Client Information Access Options Approval Method Summary

Is your client registered for INTIME?

My client is already registered for INTIME

My client is not registered for INTIME or unsure if they are registered

**i** If already registered with INTIME, your client will receive an email advising them to log in to their existing account and approve this access request.

If your client doesn't have a logon, they will receive a letter with instructions on how to register/access their account and approve this access request. By signing and returning this letter, they can authorize the access.

We highly encourage your clients to take advantage of the INTIME approval process. Paper submissions are intended for those with no computer access to complete the approval, and may cause significant delay in the approval of access requests. If your clients are signed up for INTIME, the approval process can be completed immediately.

Cancel Save Draft < Previous Next >

If the client doesn't have online access to approve the ePOA request, they will receive a letter by mail at the legal address on file with DOR. It will provide information and instructions on how to complete, sign, and return the enclosed form by mail to authorize the tax practitioner's access request.

**Note:** When using this method, make sure the client checks the boxes on the form to approve what ePOA access is approved for specific tax accounts.

**Step 6:** Review the request and then "Submit."

The screenshot shows the 'Request power of attorney access' page in the Indiana Taxpayer Information Management Engine. The page is titled 'Request power of attorney access' and includes the user 'SAMPLE PREPARER' with ID '00-0000001'. A progress bar indicates the current step is 'Summary', with previous steps 'POA Information', 'Client Information', 'Access Options', and 'Approval Method' completed. The summary section displays: 'Name of Business : SAMPLE COMPANY', 'Approval Method : Online Approval', and 'Access to all accounts requested : Yes'. At the bottom, there are buttons for 'Cancel', 'Save Draft', 'Previous', and 'Submit'.

**Step 7:** A confirmation of the submission will be provided. Note the confirmation number or print a copy (or save a pdf version) of the confirmation for your records.

The screenshot shows the confirmation page in the Indiana Taxpayer Information Management Engine. The page is titled 'Confirmation' and contains the following text: 'Your request has been submitted.', 'Your confirmation number is 0-000-067-856', and 'Please note that your submission may take several days to process.' It also provides contact information: 'If you have any questions or concerns you may submit a message by clicking "Send a message" under the "All Actions" menu or call us at (317) 232-2240, Monday - Friday, 8:00am - 4:30pm.' At the bottom, there are buttons for 'Printable View' and 'OK'.

## Managing Security and Access to Accounts

Security and access to a client's account is handled independently for each user. A "Master Logon" may create additional usernames for your organization and manage the level of access allowed to your own tax records. Keep in mind that additional users will perform work as themselves and may have access to clients and tax accounts that a "Master Logon" does not have access to, as each user will have their own set of INTIME ePOAs.

### Revoking Access to Client Accounts

Practitioners can easily revoke their own INTIME ePOA access (thus ending the ePOA):

**Step 1:** Enter the client's INTIME account and go to the "Settings" (tab) page.

**Step 2:** Cancel access to the client or tax accounts you no longer wish to have. If you cancel access to the client, access to all of their accounts will automatically be removed. When cancelling access to a specific tax account, access to the customer and any remaining tax accounts will be maintained.

### Client Revocation

Clients have the ability to enter their own "Manage ePOA Access" tab and modify a tax practitioner's level of access, including revoking practitioner ePOA access.

## More information on POA and ePOA

[Power of Attorney Options](#)

[Business Tax Customers](#)

[Individual Tax Customers](#)

[Tax Practitioners](#)

[INTIME Resources](#)